

Data Conversion Handout

The best tool we have to assist in the data conversion process is the driver's license number. Collecting these numbers now will make your jobs easier once we go live because the more DL #s we have, the more information will be properly converted, and fewer records will have to be created when customers come into the office.

You can also aide us in the data conversion process by following standard formats for data entry. Specific instructions and examples are listed below for your reference.

INDIVIDUAL:

When entering **INDIVIDUALS (I)** into the system, always enter their names in the correct order:

LAST NAME (space) FIRST NAME (space) MIDDLE NAME or middle initial (space) SUFFIX.

If the person has 2 or 3 last names, separate them with dashes, regardless of whether there are dashes on the driver's license. Use the same last name order that is on the driver's license.

If the person has an abbreviated first name or multiple first names, please combine the initials/names together to join the initials/names.

Examples:

"Thomas P. Jones, Jr." becomes "**JONES THOMAS P JR**" (with no punctuation.)

"Mary Louise Martinez-Jones" becomes "**MARTINEZ-JONES MARY LOUISE**".

"Mary Louise Martinez Jones" becomes "**MARTINEZ-JONES MARY LOUISE**".

"Mary Louise Martinez Jansen Jones" becomes "**MARTINEZ-JANSEN-JONES MARY LOUISE**".

"C.J. Alexander Doe" becomes "**DOE CJ ALEXANDER**" (with no punctuation.)

"Mary Ann Marie Jones" becomes "**JONES MARYANN MARIE**".

IN CARE OF = C/O: These should be entered as **BUSINESSES (B)** with the abbreviation "**C/O**".

Relationship Codes have not been changed

Correct:

GMAC	C/O SMITH JOHN	SMITH SUZY
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Primary Owner Field

Secondary Owner Field

Third Owner Field

Additional owners should be listed in the 3rd, 4th, & 5th fields by name only

DOING BUSINESS AS = DBA: Enter these as **BUSINESSES (B)** with the abbreviation **DBA**.

Relationship Codes have not been changed

- Abbreviate "**doing business as**" by writing "**DBA**" with no punctuation.
- For **corporations**, abbreviate as "**INC**" with no punctuation.
- For **limited liability corporations**, abbreviate as "**LLC**" with no punctuation.

Correct:

DBA =

SMITH JOHN	DBA SMITH PLUMBING
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INC =

SMITH PLUMBING INC

LLC =

SMITH PLUMBING LLC

TRUSTS: These should be entered as **BUSINESSES (B)**.

ESTATES: These should be entered as **BUSINESSES (B)**.